

Overview

THIS GUIDE PROVIDES STEPS TO CREATE A SINGLE CHART KPI IN TABLEAU USING SIMPLE CALCULATIONS AND FORMATTING.

Steps to Create the KPI

Step 1: Add Relevant Fields - Drag the necessary fields to the Marks pane. –

Example: Add LY Sales, PY Sales, Total LY Sales, Total PY Sales, and YOY Increase.

The screenshot shows the Tableau interface. On the left, the 'Data Sources' pane lists fields under 'Orders' and 'YoY Calcs'. The 'Marks' pane on the right shows the 'Automatic' mark type and various mark properties (Color, Size, Label, Detail, Tooltip, Path). The 'Measure Names' shelf contains the following fields: '1 - LY', '2 - PY', 'AGG(13 - Total ..', 'AGG(14 - Total ..', 'SUM(10 - Total ..', and 'ATTR(Month)'. A mouse cursor is hovering over the '1 - LY' field.

Orders

YoY Calcs

- 1 - LY
- 2 - PY
- 3 - IsLY
- 4 - IsPY
- 10 - Total LY Sales
- 11 - Total PY Sales
- 12 - Total LY vs PY %
- 13 - Total YoY Increase
- 14 - Total YoY Decrease
- 5 - LY Sales
- 6 - PY Sales
- 7 - LY vs PY %
- 8 - YoY Increase
- 9 - YoY Decrease

Date

- Month
- Measure Names

Marks

Automatic

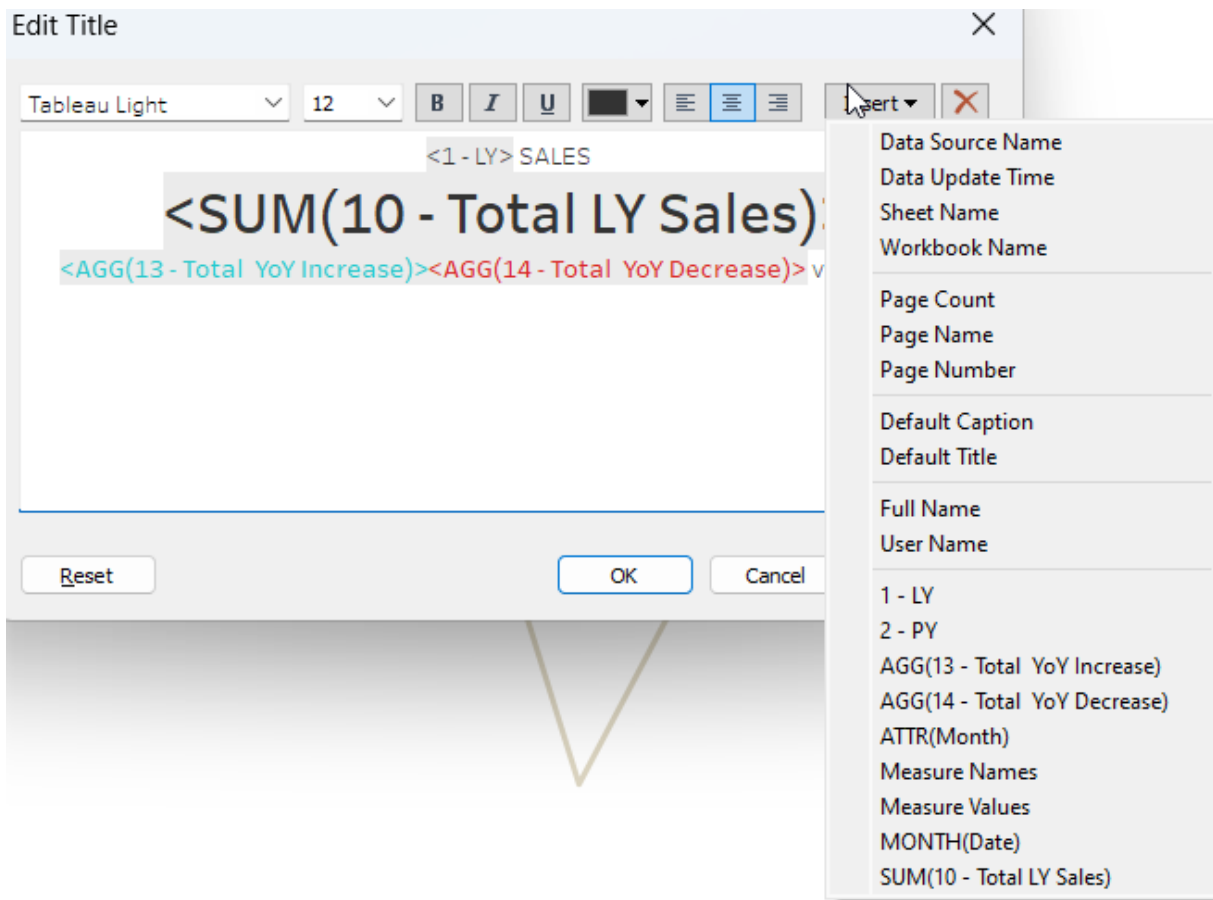
Color Size Label

Detail Tooltip Path

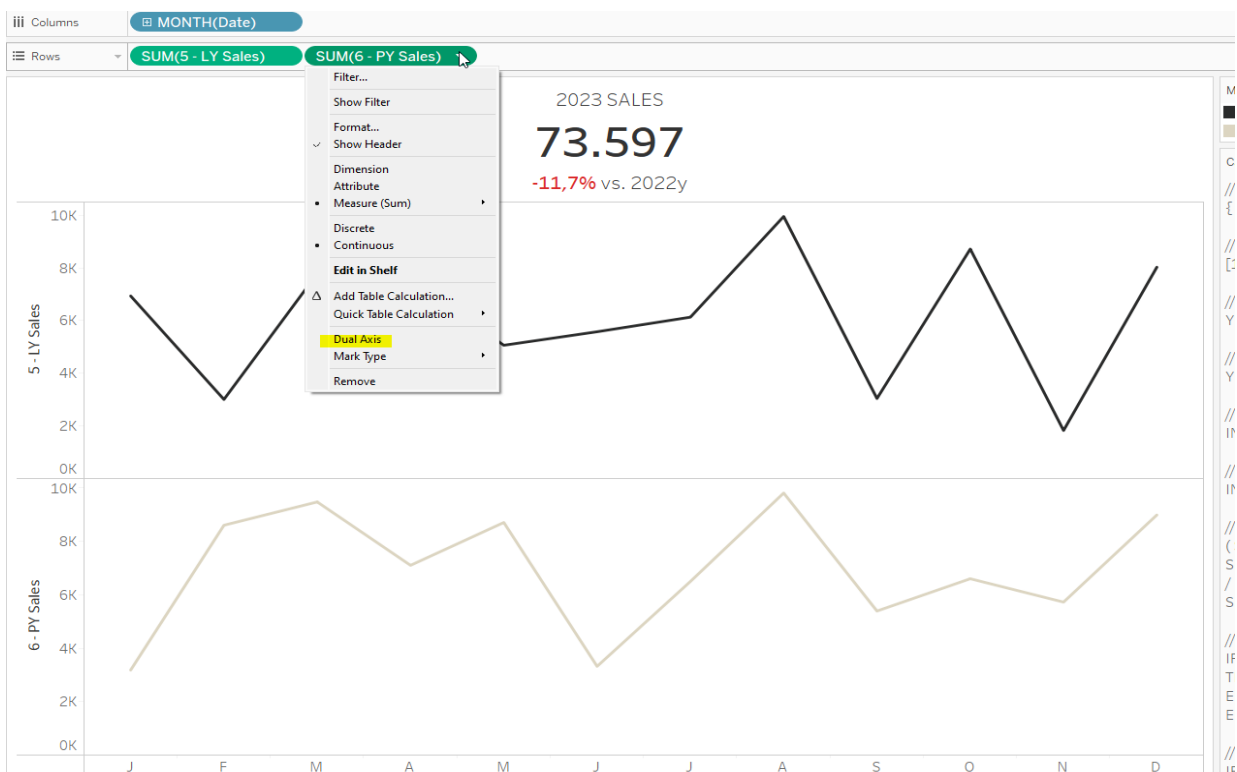
Measure Names

- 1 - LY
- 2 - PY
- AGG(13 - Total ..
- AGG(14 - Total ..
- SUM(10 - Total ..
- ATTR(Month)

Step 2: Edit the Title - Right-click on the title, edit it, and insert the required fields.



Step 3: Create a Dual-Axis Chart - Add LY Sales and PY Sales to the Rows shelf. - Right-click on one of the axes and select Dual-Axis.



Step 4: Add to the Dashboard - Save the visualization and add it to the dashboard.

